CenturyLink
Call Recording Dashboard
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Call Recording Dashboard
This user guide describes feature/functionality for your Call Recording Dashboard. For details on how to define call recording administrators and assign call recording users, refer to the Call Recording section of the Administrator Portal User Guide.

There are three levels of call recording licenses, Basic, Standard and Premium. Each has a different retention policy for recorded calls:

- **Basic** - 7 calendar days
- **Standard** - 30 calendar days
- **Premium** - 1 calendar year

Accessing the Dashboard
Access the Call Recording Dashboard after logging into your End User portal. Individuals with access to the Administrator Portal, can also access call recordings within that portal.

1. Once logged in, click Call Recordings from the main menu.
2. You can only review recordings for individuals assigned to you.
3. Be sure to click the Greenwich Mean Time hyperlink, to set the appropriate time zone.
Call Recording Home Tab

The Home Tab provides a real-time view of system data.

1. The Home tab is divided into eight distinctive panes that provide a pictorial and data overview of your company's current call usage.

2. Where applicable, panes can be customized based on the results you would like to view.

   1. First Look
   2. Calls by Category
   3. Frequent Callers
   4. Calls by Location
   5. Call Handler Summary
   6. Active Call Handlers
   7. Recent Calls
   8. Activity & Heat Map
3. Collapse and expand panes by clicking on the arrow in the upper right corner; click the **Up** arrow to collapse, click the **Down** arrow to expand.

4. With the exception of **First Look** pane, call statistic panes provide the ability to view data within each pane as either text or graphical.

5. The **Dashboard** default **Refresh** setting is set to every 30 seconds; however, you can reset the refresh value for each pane individually, except for the **First Look** pane. Refresh can be temporarily stopped by clicking the **Pause** button in the upper left corner of the Dashboard.
6. Each statistical pane provides drop down arrows for filtering.
7. Choose from options such as:
   - **Graph/Table**
   - **By Day/Month/Year to Date**
   - **Top 5 - 25 results**
   - **Refresh every 15 seconds to 4 minutes**
8. All options can be set as the same, or can be unique based on your needs or the pane statistic.
9. Panes can also be reorganized by clicking on a pane, and dragging/dropping it to a new location; allowing you to place panes with higher statistical importance, at the top of your dashboard.
First Look

The First Look pane appears horizontally across the top of the Dashboard and displays a quick view of totals for the following statistics:

1. **Calls in Progress** – identifies the total number of active calls in the system, by Group or User.
2. **Active Call Handlers** – displays total number of extensions with an active call. Active Call Handlers displays information by Group and then by User. Groups and Users will only see information based on extensions to which they have access.
3. **Calls** – identifies the total number of completed calls for the user that is currently logged in and that have a recording associated with them. This value is accumulative over the lifetime of the Group. However, the number will adjust accordingly when call files are routinely swept from the application.
4. **Duration Recorded** – identifies the sum of duration for recorded calls that have a recording associated with them, by Group and User. This value is accumulative over the lifetime of the Group.
5. **Calls in Recycle Bin** – identifies the total number of calls that have a recording associated with them and that are pending deletion. This value is accumulative over the lifetime of the Group. However, the number will adjust accordingly when call files are routinely swept from the application.
6. **Free Audio Storage** – identifies the total amount of free audio storage for the Site.
7. **Last Week’s Trend** – provides a visual display of call history for the previous week.

![First Look Pane](image-url)
Frequent Callers
The **Frequent Callers** pane displays total number of calls, by calling number, for the most frequently called numbers. This chart displays inbound calls only.

1. The number of frequent callers displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.).
2. The **Frequent Callers** pane can be displayed as text or graph by selecting **Details** or **Graph** from the drop down list. Drill down into the specific recorded calls by clicking on a specific frequent caller.
3. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the **Top Results** drop down list.

Calls By Location
The **Calls by Location** pane displays total calls by each location as determined by AreaCode/PREFIX (incoming calls from the AreaCode/PREFIX and outgoing calls to the AreaCode/PREFIX).

1. Calls included in the totals are determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.).
2. The **Calls by Location** pane can be displayed as text or a pie chart by clicking on the **View Graph** link.
3. Drill down into specific recorded calls by clicking on a location under the **Location** column. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the **Top Results** drop down list.
**Call Handler Summary**

The **Call Handler Summary** pane displays calls by duration.

1. The maximum duration, average duration, and total number of calls by call handler/number for the duration determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.).
2. The **Call Handler Summary** pane can be displayed as text or pie chart by clicking on the View Graph link. Drill down into specific recorded calls by clicking on a call handler ID under the Call Handler ID column.
3. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

**Active Call Handler**

The **Active Call Handlers** pane displays call handlers/numbers that are currently on calls, including the other party's number.

1. You are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.
2. (Note: at this time, the Monitoring function launched from the icon is not available)

**Recent Calls**

The **Recent Calls** pane displays the most recent calls, incoming and outgoing, by call handler.

1. The number of recent calls displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.).
2. The **Recent Calls** pane can be displayed as text or graph by selecting Details or Graph from the drop down list.
3. You can play a recorded call by clicking on the recorded call icon.
4. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

**Activity & Heat Map**

The **Activity & Heat Map** displays the call activity for the top 10 numbers by hourly intervals over a 24 hour period.

1. The **Activity & Heat Map** can be filtered by Call Handlers, Calling Parties, or Called Parties.
2. Additionally, call activity can be displayed as Number of Calls or Call Duration (in minutes).
3. The darker colored blocks represent the higher volume call activity while the lighter colored blocks represent the lower volume call activity.
4. Each individual color block is clickable and takes you directly to the Recorded Calls tab, where you are able to view call activity, listen to the recording, add comments, etc.
Recordings Tab

Recorded Calls
The Recorded Calls screen displays all completed recorded calls for all users assigned with the Call Recording feature.

1. In order to better manage this screen, all column headers can be sorted by clicking on the applicable column header.
2. Click once to sort the column in Ascending order, and click again to sort the column in Descending order.

3. Columns may also be hidden/shown using the Select Columns link, selectively choosing which columns to display.
4. Click Update or Cancel after selections are made

5. The following information is available for display on the Recorded Calls screen:
   1. Number – phone number of the user with the recorded call. This is also referred to as the Call Handler number or description. Next to each number is an indicator showing if the recorded call was an inbound ( ) or outbound call ( )
   2. Day – day of the week the call took place
   3. Date – actual date the call took place
   4. Time – time the call originated
5 From Number – originating phone number

6 From Caller ID – displays the name or number of the person that originated the call (currently this column will not display any data)

7 To Number – terminating number. If the user is provisioned with a one-way number or is a two way number configured with a different Caller ID number, the provisioned Caller ID number will display in this field.

8 Redirected From – displays the number of the person or group transferring the call (currently this column will not display any data)

9 Duration – the length of the call

10 Recording – identifies whether or not there is a recording associated with the call. When a call is recorded, a Recordings button () appears under the Recording column indicating there is a recorded call file for that particular call. To listen to the recorded call file, click on the Recordings button. Your default media player opens and begins playing the recorded call file (MP3 file). Please be aware that the way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file. iTunes® will load the recorded call file in the library and you have to click play to begin listening to the file.

11 Annotate – allows you to add comments and markers to specific parts of calls to indicate where in the call a notable event might have occurred. For example: a contact center manager (site administrator) can find a notable event in a call and mark it for future review with a comment. This Annotate button () indicates there are currently no annotations associated with the corresponding recorded call file. However, this Annotate button () indicates there are annotations associated with the recorded call file.

   - To add an annotation, click on the Annotate button. Select the Play button to begin playing the recorded call. Select Pause when you come to the point in the call that you wish to add an annotation. Enter a subject marker description and any notes to better identify the annotation and click Add Marker. You must repeat each step for each annotation you wish to add to the call.

12 Comments – enables a text description to be associated with a recording which allows searching of keywords to easily find specific recordings. An Add Comment button () indicates there are currently no comments associated with the corresponding recorded call file. An Edit button () indicates there are currently comments associated with the corresponding recorded call file. To add comments to a recorded call file, click on the Add Comment button and enter the applicable text in the text field. To change an existing note, click the Edit button. Click Save.
Filtering

Number, Redirection, Date/Time, Duration, Category, or Other (or a combination of all five) Filters can be applied to the screen to assist in searching and displaying just the information pertinent to your current needs.

1. Click Filter at the top of the Recorded Calls screen.
2. Click the tabs on the left to input categories you would like to sort by; such as:
   - By Number
   - By Employee (not used at this time)
   - By Redirection
   - By Date/Time
   - By Duration
   - Other
3. Each tab has different categories to filter from; all fields or options do not have to be selected, the more data you input, the more narrowed your search will be.
4. Click the Apply Changes button, then click the Search icon in the lower right corner of the page (next to the Save icon).
5. Recordings based on your search filter, appear at the bottom of the page.
6. Click on Filter again, to collapse filter options.
Play Recorded Call

Click the **Recordings** tab and click the **Recorded Calls** sub tab to ensure that you are looking at the list of recorded calls.

1. Find a call and click the **Recordings** button (○) corresponding to that call. Your default media player opens and begins playing the recorded call file (MP3 file).

2. Use buttons at the bottom of the **Call Recording** window to **Stop**, **Rewind/Fast Forward**, **Play/Pause**, **Mute** and **Increase/Decrease Volume**.

3. Once you are done listening to the recording, click the **Close** button.
Annotation

An Annotation enables notes to be added to call recordings at specific points in the playback of the call. These notes may be helpful in the training of employees or documenting specific points in calls for security, legal or training reasons.

1. Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

2. Find a call and click on the Annotate button ( ) that corresponds to that call. A window pops up which enables the adding of an annotation to the call.

3. You have two options with how annotations are tagged to the call. Select the desired option by hitting the radio button next to the description.
   - **Keep Notes in Sync With Recording** – markers and notes will stay in sync with the playback. It is not possible to view notes for markers until that marker is reached during playback.
   - **Ad-Hoc review** – markers and notes can be view separately from call playback by selecting the marker.
4. To add an annotation, select the Play button to start recording playback.
5. When the playback reaches a point of interest, click the Pause button.
6. Under Add a Marker, enter a description for the note in Marker Description, add notes in the Notes field and click Add Marker.
7. If desired, additional markers can be added to the call, by repeating steps 4-6. Saved markers are shown in the Annotate window.
8. To delete a marker, click the Delete Marker button (-trash can) that corresponds with the annotation that is no longer needed.
9. Click OK in the confirmation window, which removes the note.
10. Annotations can be downloaded by clicking Download Annotation.
11. Select Open With or Save File.
12. When annotation management is completed, click the Close button.
Comments

Comments are useful in situations when a customer has called in several times. Comments can be added to each recorded call so that users can see the steps that have been taken along the way.

1. Click the Recordings tab and click Recorded Calls to ensure that you are looking at the list of recorded calls.
2. Find a call and click on the Comments button ( ) that corresponds to that call.

3. A Call Comments window appears with details about the call and a blank entry box.
4. In the Comment Text field, add desired notes about the call. Comment text cannot be greater than 1024 characters.
5. Click Save and Close when notes are completed.
6. The **Comments** button changes to an **Edit** button (谤) indicating there is a comment associated with this call.

7. Click the **Edit** button (谤) to view, edit or input additional comments.

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**Download Call Record**

**Downloading** enables a user to save selected recordings to a local storage location (users PC for example). Downloaded recordings are saved as a zip file folder in mp3 format.

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

2. Select the recorded call(s) you wish to download by clicking in the corresponding option box to the left of the **Number** column. To select all calls, select the checkbox at the top of the column.

3. Click the **Download** link at the top or bottom of the recorded calls list.

4. Click **Open With** or **Save File** to place your call in your preferred directory location.
Export/Export All

Export/Export All allows you to save the list of recorded calls to your PC in .csv format.

1. Click the **Recordings** tab and click **Recorded Calls** to ensure that you are looking at the list of recorded calls.
2. Select the recorded call(s) you wish to export by clicking in the corresponding option box to the left of the number column. You may select calls from other pages by hitting the page numbers on the left of the page below the calls list; or you may select the **Export All** button which exports all calls from all pages. If a filter is applied only the filtered calls will be selected.
3. Select the **Export** link at the top or bottom of the **Recorded Calls** page.
4. Click **Open with** or **Save File**.
5. Opening the file opens the .csv file using your default .csv associated program.

Calls In Progress

**Alerts** are used to notify you of calls that meet specific conditions as defined by you. The system looks at all terminating calls and when it finds calls that meet your criteria, it notifies you with information regarding those calls so that you can address any issues or make any necessary changes to current policies or procedures. A history of the alerts that have executed is available from the **Alerts** tab.
**Reports Tab**

There are seven **Reports** included in the application, to assist with user administration activities. Reports identify information that can also be found within the dashboard or Home tab, but provides more detail. Reports can be viewed as text or in graphical format. You can also export Reports to a local drive or removable storage device. Report content can be filtered by number, date, and time.

1. Click the **Reports** tab.

2. Click **Export** to open or save your report in Excel format.
3. Click **Chart** to view the report data in graphical format.
4. Click the topic you would like to report on, this example is a **Call Handler Activity** report.
Call Handler Activity Report
The Call Handler Activity report displays the last 30 days of activity for each call handler in the application. The Call Handler Activity report can be displayed as text or pie chart by clicking the Chart button found on the report toolbar. The report displays the number, description, total number of calls, average call duration, minimum duration, and maximum duration by call handler.

Calling Locations Report
The Calling Locations report displays total calls by each location as determined by the Area Code/Prefix, for the last 30 days. The Calling Locations report can be displayed as text or pie chart by clicking the Chart button found on the report toolbar. The report displays the number, location, and total number of calls made to that location.

Daily Usage Report
The Daily Usage report displays the activity totals for the day in the application. The Daily Usage report can be displayed as text or column chart by clicking the Chart button found on the report toolbar. The report displays the date, total number of calls, average call duration, minimum duration, and maximum duration for the day.

Frequent Callers Report
The Frequent Callers report displays the callers (by number) that have called the most frequently. The Frequent Callers report can be displayed as text or bar chart by clicking the Chart button found on the report toolbar. The report displays the number, the name associated with the number (caller ID), the total number of calls, average call duration, minimum duration, and maximum duration. The report is sorted in order of the most frequently called or dialed number.

Hourly Usage Report
The Hourly Usage report displays a distribution of call activity across the hours of the day. The report can be displayed as text or column chart by clicking the Chart button found on the report toolbar. The report displays the hour, total number of calls, average call duration, minimum duration, and maximum duration for each hour.

Unused Numbers Report
The Unused Numbers report identifies numbers that have had no usage. The Unused Numbers report is text format only. However, you are able to click on the View and Edit Details link in the report to go directly to the numbers page. The report displays the number and description.

User Details Report
The User Details report identifies information about each user of the application. The User Details report is text format only. The report displays the username, email address, the date the user was created, the date the user last logged on to the application, the date the user's password was last changed, the total amount of numbers assigned to the user, total number of annotations and categories created by the user, and whether or not the user has permission to archive calls to a CRM application.
Alerts Tab

Alerts are used to notify you of calls that meet specific conditions as defined by you. The system looks at all terminating calls, and if calls are found meeting your criteria, you are notified with information regarding those calls so you can address issues or make any necessary changes to current policies or procedures. A history of executed alerts are also available from the Alerts tab.

Creating an Alert Event

1. Click the Alerts tab.
2. If this is your first alert, a New Alert window opens.
3. Fill in fields as desired for your alert.
a. **Name** – enter a name for the alert (a maximum of 50 characters).

b. **Description** – enter a description for the alert.

c. **Event Type** – select an event type in the dropdown box.
   - **Call Initiated** – Creates an alert when a call is started that meets the entered criteria.
   - **Call Terminated** – Creates an alert when a call is ended that meets the entered criteria

d. **Enabled** – check the enabled box to make this alert active. If not checked, the alert will not be active.

e. **Alert Day** – select a day, days or date range for which this alert will be active. You can select multiple criteria such as Days of the Week and a Date Range.
   - **Alert on any day** - the alert will run every day that remains active.
   - **Days of Week** - the options Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday will appear. Select the specific days the alert should run. The alert will run on the selected day(s) as long as it remains active.
   - **Date** - enter a specific call date. The alert will only run on this call date.
   - **Date Range** - enter a start and end date. The alert will only run during this date range.

<table>
<thead>
<tr>
<th>At least one of the criteria below must be entered to save the Alert</th>
</tr>
</thead>
<tbody>
<tr>
<td>f. <strong>Start Time</strong> - if applicable, select the start time the Alert should begin running on the selected day(s).</td>
</tr>
<tr>
<td>g. <strong>End Time</strong> - if applicable, select the end time that the Alert should stop running on the selected day(s).</td>
</tr>
<tr>
<td>h. <strong>Time Zone</strong> - select a time zone that you wish to apply to the alert.</td>
</tr>
<tr>
<td>i. <strong>From Caller ID</strong> - defines the originating caller ID or partial originating caller ID on which to alert.</td>
</tr>
<tr>
<td>j. <strong>To Caller ID</strong> - defines the terminating caller ID or partial terminating caller ID on which to alert.</td>
</tr>
<tr>
<td>k. <strong>From Number</strong> - defines the originating number or partial originating number on which to alert.</td>
</tr>
<tr>
<td>l. <strong>To Number</strong> - defines the dialed number or partial dialed number on which to alert.</td>
</tr>
<tr>
<td>m. <strong>Redirected From</strong> – defines the number of the person or group transferring the call.</td>
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<tr>
<td>n. <strong>Redirected To</strong> – defines the number to which the call was transferred.</td>
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<tr>
<td>o. <strong>Location</strong> - defines the location or partial location on which to report.</td>
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<tr>
<td>p. <strong>Add a Category</strong> – not in use at this time.</td>
</tr>
<tr>
<td>q. <strong>Add a Comment</strong> – allows the user to add comments about the call. These comments will apply to all calls that fall within the alert criteria and will automatically appear on the Recorded Calls tab when the alert is fired.</td>
</tr>
</tbody>
</table>
4. Select if you want to be notified by email when an alert occurs by clicking the Email option box.

5. By default Web Application is always checked and Alerts appear in this Alerts tab.

6. If you select notification by email, you must enter the To and From email addresses.

7. Optionally enter the Subject, From Name, and To Name.

8. Click Save or Cancel.